



COVID-19

Current healthcare MR feasibility

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Primary Market Research

Findings and Feasibility

Introduction

- **Why?**

- Address concern over continuing MR with a data-driven approach
- Operate in line with HCPs' wishes – be guided by them to ensure no harm.
- Industry-wide collaboration to unify response

- **How?**

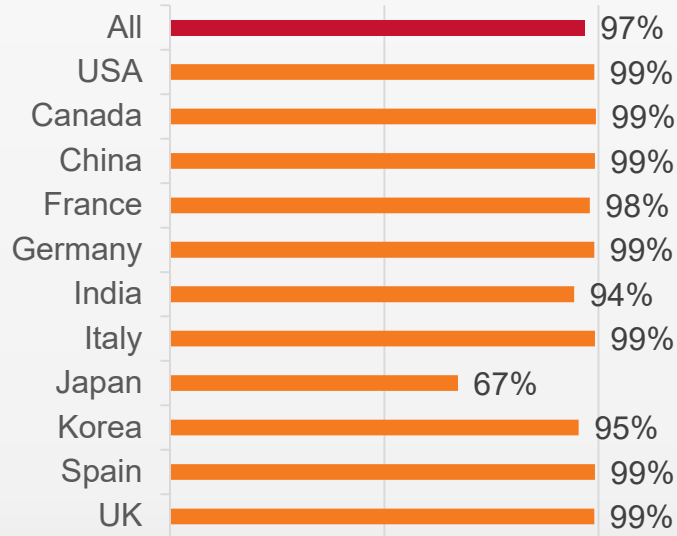
- Online survey, no incentive
- LOI: 5 minutes

- **Who?**

- 31,384 HCPs
- USA, Canada, Europe, Asia, Australasia



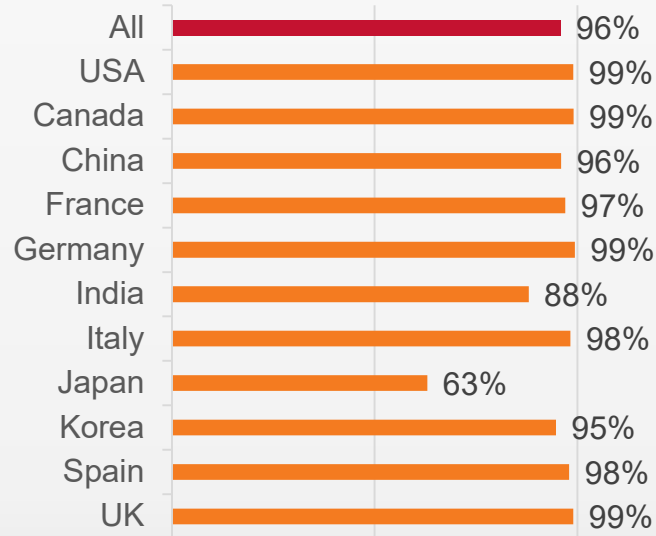
Percentage of HCPs currently willing to participate in healthcare market research



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- Sample includes 3.2k HCPs in frontline* specialties (97.5%), and 2.9k nurses (99.3%)
- Many HCPs currently have more available time than normal
 - 1 in 4 UK doctors 'sick or in isolation' (source: Sky News, 03/30/20)
 - 39% US doctors surveyed haven't treated a patient with COVID-19 (source: M3GR PMR 04/03/20)
- Normal reasons for participation:
 - Scientific progress
 - Learning and development
 - Incentives

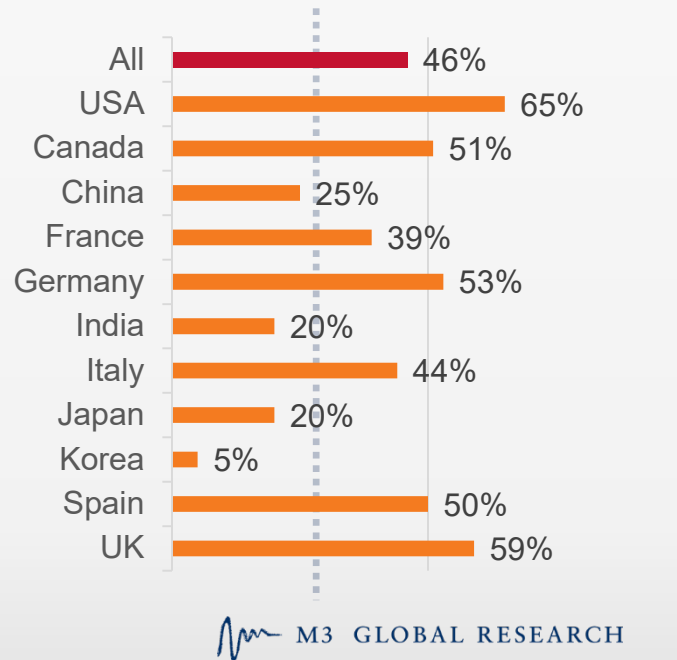
Percentage of HCPs currently willing to participate in online surveys



- Frontline specialties*: 96.4%
- Nurses: 98.6%
- RRs are stable, comparing March 2020 to Nov 19-Feb 20, RRs, email open rates and click-through rates are all up
- There are always peaks and troughs with RRs – last week we saw a drop in Finland, Austria, Belgium and Switzerland

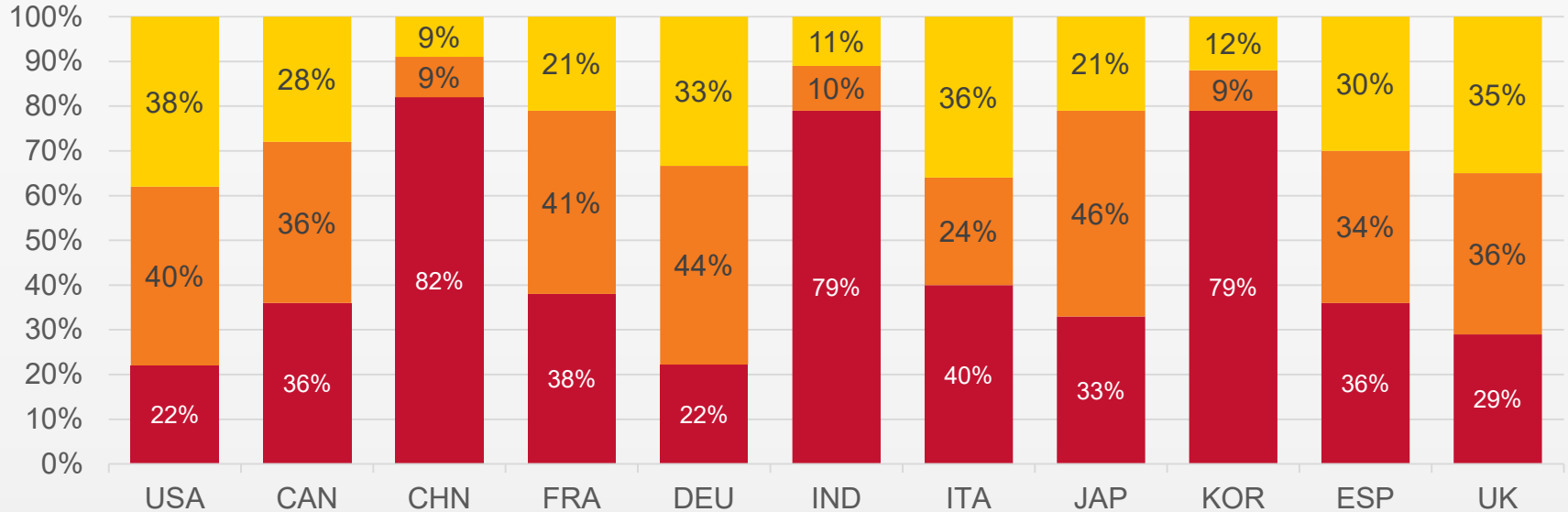
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Percentage of HCPs currently willing to participate in telephone interviews

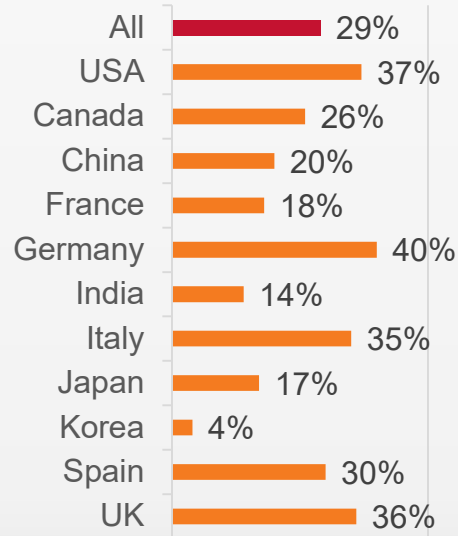


- Pre-COVID, 30% of the panel took part in qualitative research (see dotted line)
 - US up to 65% from 35%
 - EU up to 55% from 22%
- 14,700 respondents happy to do TDIs
- Cultural differences affect qual participation
- As with face-to-face, there is a degree of personal preference

What is the maximum length of telephone interview you would be willing to participate in?



Percentage of HCPs currently willing to participate in face to face research



- Willingness does not equate to feasibility or suitability, irrespective of government advice
- Use as an opportunity to innovate, pivot and adapt
- Leverage technology and virtual methodologies to deliver remote qual
- Consider agile products

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So What Next?

Practical Applications of the Data

Practical Applications



**Caution on low
IR studies**



**Profile your
sample correctly**



**Use of online
tech**



**Choose appropriate
methodologies**



**Email contact
- 1 digest per day**



**Limit cold calling
and switchboards**



**Ensure
quality**



**Considerate
language**

Conclusions



Strong willingness to normalise and continue participating in MR a reassuring positive.



Let HCPs manage their own inboxes, and make their own decisions



Adapt, embrace technology, and innovate – this is an opportunity to do things differently whilst keeping both life and business moving forwards



Willingness doesn't equate to appropriateness, so lead with considerate **'Do no harm' approach**.



Trust your fieldwork partner, they have strong relationships with HCPs and will provide guidance in a fluid situation.

EphMRA Webinar:

Healthcare Market Research Update – EU5

Wednesday 8 April, 10am ET / 3pm BST (60 mins)

Register on the EphMRA website: <https://www.ephmra.org/events-training/events/healthcare-market-research-status-update/>

Q&A